

STATE PROCUREMENT OFFICE

PROCUREMENT TRAINING:

COURSE DESCRIPTIONS,

Schedule and Locations

The State Procurement Office (SPO) Course Descriptions and Workshop Schedule are available for interested purchasing personnel. To simplify registration procedures, personnel will register on-line at the SPO webpage: <http://www.spo.hawaii.gov>.

Please note that this listing is subject to changes due to availability of class locations, enrollment, or instructor. Personnel will need to check the Schedule of Workshops for amendments to the schedule; all changes will be noted on the web.

LIST OF AVAILABLE PROCUREMENT TRAINING COURSES

Chapter 103D The Procurement Code (Goods, Services and Construction)

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PROCUREMENT OF GOODS, SERVICES, & CONSTRUCTION

HRS CHAPTER 103D

SPO-101 SOURCE SELECTION METHOD – COMPETITIVE SEALED BIDS

Instruction on the rules and procedures of the competitive sealed bid process or Invitation for Bid (IFB), posting the Procurement Notice, preferences, pre-bid conference, specifications, protest.

Attendee: Purchasing personnel, program managers/specialist, and personnel conducting IFBs
Course Length: 1 Day
Date/Location/Time: See attached Workshop Schedule

SPO-102 SOURCE SELECTION METHOD – COMPETITIVE SEALED PROPOSALS

Instruction on the rules and procedures of the competitive sealed proposal process or Request for Proposal (RFP), pre-proposal conferences, cost/pricing data, protest, debriefing.

Attendee: Purchasing personnel, program managers/specialist, and personnel utilizing RFPs
Course Length: 1 Day
Date/Location/Time: See attached Workshop Schedule

SPO-103 SOURCE SELECTION METHOD – EMERGENCY PROCUREMENT

Understand the definition of an emergency procurement and what conditions may lead to an emergency procurement; learn how to document an emergency procurement; step through the processes to conduct an “after-the-fact” emergency procurement; where, when and how to posting the emergency procurement.

Attendee: Purchasing personnel, program managers/specialist, and personnel conducting emergency procurements
Course Length: 2 hours
Date/Location/Time: See attached Workshop Schedule

SPO-104 SOURCE SELECTION METHOD - PROFESSIONAL SERVICES

Understand the definition of a professional service; step through the different processes to procure professional services; how to prepare and post the procurement notice; responsibilities of the review and selection committees; how to conduct a debriefing; where, when and how to posting the professional service award.

Attendee: Purchasing personnel, program managers/specialist, and personnel awarding contracts for professional services
Course Length: 2 hours
Date/Location/Time: See attached Workshop Schedule

SPO-105 SOURCE SELECTION METHOD – SMALL PURCHASES/HePS

Understand the definition of a small purchase; review the policies and procedures of conducting small purchases; identify the forms to use and how to properly complete them; parceling of small purchases; and provide an overview of the Hawaii Electronic Procurement System (HePS).

Attendee: Purchasing personnel, program managers/specialist, and personnel conducting small purchases procurement
Course Length: 3 hours
Date/Location/Time: See attached Workshop Schedule

SPO-106 SOURCE SELECTION METHOD – SOLE SOURCE PROCUREMENT

Understand the definition of a sole source procurement and the essential requirements; learn how to document a sole source procurement; how to properly complete sole source forms; step through the processes to obtain CPO approval; where, when and how to posting the sole source award.

Attendee: Purchasing personnel, program managers/specialist, and personnel awarding purchase orders/contracts for sole source procurements
Course Length: 2 hours
Date/Location/Time: See attached Workshop Schedule

SPO-107 EXEMPTION FROM HRS CHAPTER 103D

This workshop, for state and county personnel, will help you understand the definition of a procurement exempt from HRS Chapter 103D; lists of exempt procurements; understand the essential requirements and how to document an existing exempt procurement; learn what forms are necessary and how to properly complete them; step through the processes to obtain CPO approval; where, when and how to posting the exempt procurement.

Attendee: Purchasing personnel, program managers/specialist, and personnel awarding purchase orders/contracts for exempt procurements
Course Length: 2 hours
Date/Location/Time: See attached Workshop Schedule

SPO-108 TRAVEL REQUIREMENTS

Step-by-step process for making intra-state hotel and car arrangements and out-of-state airline reservations, including an overview of the website and online services provided by the price list vendor(s). Review of the travel rules and forms available online.

Attendee: Personnel responsible for making travel arrangements
Course Length: 2.5 hours
Class Date & Time: Upon request - Contact Program Manager at ph 587-4702
Class Location: Requesting agency to arrange location and setup (i.e A/V screen, internet access, etc.)

SPO-200 AVAILABLE STATE AND FEDERAL SURPLUS PROPERTY

Tour the Surplus Property warehouse to view current available surplus items; details on the process to obtain state and federal surplus property and become an eligible donee.

Attendee: Open to interested qualified donee (a government agency, qualified private non-profit education and/or health organizations; medical institutions, hospitals, health centers, schools, colleges, child care centers, providers of homeless programs, museums).

Course Length: 1 hour

Class Date & Time: TBD

Class Location: Surplus Property Warehouse
729B Kakoi Street
Honolulu, Hawaii 96819

SPO-300 ESSENTIALS OF INVENTORY PROPERTY MANAGEMENT

Provides a comprehensive understanding on the requirements of the State of Hawaii's Inventory Management System. The PowerPoint presentation will cover property accountability, internal control procedures, recording of property, supplies, disposal process, and the Quarterly Inventory Update Process including sample transactions to update your DAGS Inventory System account.

Attendee: Personnel tasked with inventory management responsibility.

Course Length: 2 hours

Class Date & Time: Upon request - Contact Inventory Management at ph 831-6756

Class Location: Requesting agency to arrange location and setup (i.e. A/V screen, PA system, etc.)

PURCHASE OF HEALTH AND HUMAN SERVICES

CHAPTER 103F, HRS

SPO-H-500 BASICS OF PROCURING HEALTH & HUMAN SERVICES

Overview of procurement of health and human services; what is procurement, why and when do we procure; coordinating the procurement team, planning and requests for information; posting procurement notices, the five methods of procurement: competitive, treatment, restrictive (sole source), small purchase and crisis; exempt procurements; RFP templates and contracting.

Attendee: Purchasing personnel, program managers/specialists or other personnel involved in or supervising the planning, procuring, contracting or monitoring of health and human services.

Course Length: 1/2 Day

Date/Time/Location: TBD

SPO-H-501 PLANNING, REQUEST FOR INFORMATION (RFI), COLLABORATION

Overview of planning, the team approach, requirements for conducting requests for information, collaboration that does not impinge on open competition for contracts, utilizing the RFP and contracts database websites and the report of planned purchases as planning tools; procurement and applying for federal grants.

Attendee: Purchasing personnel, program managers/specialists, or other personnel involved in the planning, procuring or contracting for health and human services.

Course Length: 2 hours

Date/Time/Location: TBD

SPO-H-502 SOURCE SELECTION METHOD – COMPETITIVE PURCHASE OF SERVICES, THE REQUEST FOR PROPOSALS (RFP) PROCESS

Overview of the RFP development process, including the RFP team, timelines, RFP templates, conditions for use, administrative requirements, service specifications, instructions for responding to the RFP, evaluation criteria, and attachments; deciding when to require supporting documents; the RFP and contracts database websites as planning tools; procurement notice requirements; RFP orientation meeting and RFP addenda.

Attendee: Purchasing personnel, program managers/specialists, or other personnel developing service specifications, conducting competitive procurements, evaluating proposals, administering/monitoring contracts.

Prerequisite: Basics of Procuring Health and Human Services

Course Length: 1/2 Day

Date/Time/Location: TBD

SPO-H-503 SOURCE SELECTION METHODS – TREATMENT, RESTRICTIVE, CRISIS, AND SMALL PURCHASE OF SERVICES

An in-depth overview of the source selection methods other than competitive (RFP). Includes when each method may be used, procedures, developing quality approval requests as applicable, forms, procurement notice requirements, contracts database posting and record-keeping.

Attendee: Purchasing personnel, program managers/specialists, or other personnel, who plan for, conduct procurements or contract for treatment, restrictive, crisis, or small purchase of service procurements.
Prerequisite: Basics of Procuring Health & Human Services
Course Length: 1/2 Day
Date/Location/Time: See attached Workshop Schedule

SPO-H -504 EXEMPTION FROM HRS CHAPTER 103F

Procurements exempt by Hawaii Revised Statutes (HRS) or Hawaii Administrative Rules (HAR), establishing proper justification and documentation for requesting exemptions, request for exemption forms, contracts database posting requirements and the contract file.

Attendee: Purchasing personnel, program managers/specialists, or other personnel who plan for health and human services, request exemptions, administer or monitor health and human service contracts exempt from HRS Chapter 103F.
Prerequisite: Basics of Procuring Health and Human Services
Course Length: 2 hours
Date/Time/Location: TBD

SPO-H-505 EVALUATING PROPOSALS RECEIVED IN RESPONSE TO AN RFP

Overview of proposal evaluation and steps to take from the receipt of proposals to notice of award. including register of proposals, mandatory requirements, correctable errors, rejection of proposals, evaluator and advisor qualifications and training, confidentiality issues, evaluation criteria, scoring proposals and documentation, discussion with applicants after proposal submittal deadline, notice of award - statement of findings and decision, contract negotiations, inadequate response to an RFP.

Attendee: Purchasing personnel, program managers/specialists, or other personnel writing, conducting, or evaluating RFPs, administering or monitoring competitive purchase of service contracts.
Prerequisite: The Request for Proposals (RFP) Process
Course Length: 3 hours
Date/Time/Location: TBD (~Jan 2007)

SPO-H-506 RFPs - GETTING FROM A NOTICE OF AWARD TO AN EXECUTED CONTRACT

Overview of the process from the notice of award through the execution of a contract, including notice of award, protests and requests for reconsideration, contract negotiations and discussions with applicants after award, contract development, preventing interruption of services.

Attendee: Purchasing personnel, program managers/specialists, or other personnel writing, conducting, evaluating RFPs, monitoring or administering competitive purchase of service contracts.

Course Length: 3 hours

Prerequisites: The Request for Proposals Process

Date/Time/Location: TBD (~March/April 2007)

SPO-H-507 CONTRACTS DATABASE REPORTING SYSTEM (CDRS)

Description of the database, information to be posted and deadlines; how to post information, utilizing the database for management and planning purposes.

Attendee: Purchasing personnel, program managers/specialists, personnel administering contracts using any of the methods of procurement, personnel responsible for reporting on the system.

Prerequisite: Basics of Procuring Health and Human Services, basic knowledge of web browser.

Course Length: 1 hour

Date/Time/Location: TBD

SPO-H-508 The RFP Website (RFPW)

Overview of the RFP website, posting requirements and deadlines; how to post, utilizing the RFP database for planning purposes.

Attendee: Purchasing personnel, program managers/specialists, contract administrators for the competitive method of procurement, personnel responsible for posting RFPs.

Prerequisite: Basic knowledge of web browser.

Course Length: 1 hour

Date/Time/Location: TBD

State Procurement Office
Schedule of Procurement Workshops and Locations
 August 21, 2006

Date	Start	End	Location
Hawaii			
Emergency Procurements			
11/03/06	8:00 AM	10:00 AM	Hilo State Office Building
11/03/06	10:00 AM	12:00 PM	Hilo State Office Building
12/01/06	8:00 AM	10:00 AM	Kona Airport Conference Room
12/01/06	10:00 AM	12:00 PM	Kona Airport Conference Room
Exemptions from Chapter 103D, HRS			
11/01/06	8:00 AM	10:00 AM	Hilo State Office Building
11/02/06	8:00 AM	10:00 AM	Hilo State Office Building
11/28/06	8:00 AM	10:00 AM	Kona Airport Conference Room
11/29/06	8:00 AM	10:00 AM	Kona Airport Conference Room
Professional Services			
11/01/06	1:00 PM	4:00 PM	Hilo State Office Building
11/02/06	1:00 PM	4:00 PM	Hilo State Office Building
11/28/06	1:00 PM	4:00 PM	Kona Airport Conference Room
11/29/06	1:00 PM	4:00 PM	Kona Airport Conference Room
Small Purchases-Hawaii Electronic Procurement System (HePS)			
10/27/06	8:30 AM	11:30 AM	Hilo State Office Building
10/27/06	1:00 PM	4:00 PM	Hilo State Office Building
10/30/06	8:30 AM	11:30 AM	Hilo State Office Building
10/30/06	1:00 PM	4:00 PM	Hilo State Office Building
11/27/06	8:30 AM	11:30 AM	Kona Airport Conference Room
11/27/06	1:00 PM	4:00 PM	Kona Airport Conference Room
11/30/06	8:30 AM	11:30 AM	Kona Airport Conference Room
11/30/06	1:00 PM	4:00 PM	Kona Airport Conference Room
Sole Source Procurements			
11/01/06	10:00 AM	12:00 PM	Hilo State Office Building
11/02/06	10:00 AM	12:00 PM	Hilo State Office Building
11/28/06	10:00 AM	12:00 PM	Kona Airport Conference Room
11/29/06	10:00 AM	12:00 PM	Kona Airport Conference Room

Date	Start	End	Location
<i>Kauai</i>			
Emergency Procurements			
09/25/06	8:00 AM	10:00 AM	Kauai State Office Building
09/25/06	10:00 AM	12:00 PM	Kauai State Office Building
Exemptions from Chapter 103D, HRS			
09/19/06	8:00 AM	10:00 AM	Kauai State Office Building
09/20/06	8:00 AM	10:00 AM	Kauai State Office Building
Professional Services			
09/19/06	1:00 PM	4:00 PM	Kauai State Office Building
09/20/06	1:00 PM	4:00 PM	Kauai State Office Building
Small Purchases-Hawaii Electronic Procurement System (HePS)			
09/15/06	8:30 AM	11:30 AM	Kauai State Office Building
09/15/06	1:00 PM	4:00 PM	Kauai State Office Building
09/22/06	8:30 AM	11:30 AM	Kauai State Office Building
09/22/06	1:00 PM	4:00 PM	Kauai State Office Building
Sole Source Procurements			
09/19/06	10:00 AM	12:00 PM	Kauai State Office Building
09/20/06	10:00 AM	12:00 PM	Kauai State Office Building

Maui

Emergency Procurements			
10/20/06	8:00 AM	10:00 AM	Maui State Office Building
10/20/06	10:00 AM	12:00 PM	Maui State Office Building
Exemptions from Chapter 103D, HRS			
10/18/06	8:00 AM	10:00 AM	Maui State Office Building
10/19/06	8:00 AM	10:00 AM	Maui State Office Building
Professional Services			
10/18/06	1:00 PM	4:00 PM	Maui State Office Building
10/19/06	1:00 PM	4:00 PM	Maui State Office Building
Small Purchases-Hawaii Electronic Procurement System (HePS)			
10/13/06	8:30 AM	11:30 AM	Maui State Office Building
10/13/06	1:00 PM	4:00 PM	Maui State Office Building
10/16/06	8:30 AM	11:30 AM	Maui State Office Building
10/16/06	1:00 PM	4:00 PM	Maui State Office Building
Sole Source Procurements			
10/18/06	10:00 AM	12:00 PM	Maui State Office Building
10/19/06	10:00 AM	12:00 PM	Maui State Office Building

Date	Start	End	Location
Oahu			
Competitive Sealed Proposals			
11/14/06	8:30 AM	3:00 PM	Oahu- DOH State Laboratory
11/16/06	8:30 AM	3:30 PM	Oahu- DOH State Laboratory
11/21/06	8:30 AM	3:30 PM	Oahu- DOH State Laboratory
<i>Note: Neighbor isle workshops to be scheduled.</i>			
Competitive Sealed Bids			
12/12/06	8:00 AM	3:30 PM	Oahu- McCoy Pavilion
12/13/06	8:00 AM	3:30 PM	Oahu- McCoy Pavilion
12/14/06	8:00 AM	3:30 PM	Oahu- McCoy Pavilion
<i>Note: Neighbor isle workshops to be scheduled.</i>			
Emergency Procurements			
10/03/06	1:00 PM	3:00 PM	Oahu- DOH State Laboratory
10/05/06	1:00 PM	3:00 PM	Oahu- DOH State Laboratory
10/10/06	1:00 PM	3:00 PM	Oahu- DOH State Laboratory
10/11/06	1:00 PM	3:00 PM	Oahu- DOH State Laboratory
10/25/06	1:00 PM	3:00 PM	Oahu- DOH State Laboratory
Exemptions from Chapter 103D, HRS			
10/24/06	8:00 AM	10:00 AM	Oahu- DOH State Laboratory
10/25/06	8:00 AM	10:00 AM	Oahu- DOH State Laboratory
10/25/06	1:00 PM	3:00 PM	Oahu- DOH State Laboratory
10/26/06	8:00 AM	10:00 AM	Oahu- DOH State Laboratory
Professional Services			
10/03/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
10/05/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
10/10/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
10/11/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
Small Purchases-Hawaii Electronic Procurement System (HePS)			
09/06/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
09/06/06	1:00 PM	4:00 PM	Oahu- DOH State Laboratory
09/08/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
09/08/06	1:00 PM	4:00 PM	Oahu- DOH State Laboratory
09/11/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
09/11/06	1:00 PM	4:00 PM	Oahu- DOH State Laboratory
09/12/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
09/12/06	1:00 PM	4:00 PM	Oahu- DOH State Laboratory
09/14/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory

Date	Start	End	Location
<i>Oahu</i>			
09/14/06	1:00 PM	4:00 PM	Oahu- DOH State Laboratory
09/26/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
09/26/06	1:00 PM	4:00 PM	Oahu- DOH State Laboratory
09/28/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
09/28/06	1:00 PM	4:00 PM	Oahu- DOH State Laboratory
10/04/06	8:30 AM	11:30 AM	Oahu- DOH State Laboratory
10/04/06	1:00 PM	4:00 PM	Oahu- DOH State Laboratory
Sole Source Procurements			
10/24/06	10:00 AM	12:00 PM	Oahu- DOH State Laboratory
10/25/06	10:00 AM	12:00 PM	Oahu- DOH State Laboratory
10/26/06	10:00 AM	12:00 PM	Oahu- DOH State Laboratory
11/08/06	9:30 AM	11:30 AM	Oahu- DOH State Laboratory
11/08/06	1:00 PM	3:00 PM	Oahu- DOH State Laboratory
Treatment, Restrictive, Crisis and Small Purchase of Services			
09/13/06	9:15 AM	12:30 PM	Oahu- Keelikolani Building

Workshop Addresses

Hilo State Office Building, 75 Aupuni St., 1st Floor Conference Rooms A-C, Hilo
Kona International Airport, Conference Room, Keahou

Kauai State Office Building, 3059 Eiwa St., 3RD Floor Conference Rms. A-C, Lihue

Maui State Office Building, 54 High St., 3rd Floor Conference Rooms A-B, Wailuku

Dept. of Health State Laboratories, 2725 Waimano Home Rd., Pearl City
Keelikolani Building, 830 Punchbowl St., Room 310, Honolulu
McCoy Pavilion, Ala Moana Beach Park, Honolulu